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MARKET ACCESS SECRETARIAT
Global Analysis Report

Sector Trend Analysis
Bakery and Breakfast Cereals Products
in Japan

August 2016

EXECUTIVE SUMMARY

Japan continues to represent one of the best opportunities in the world for exporters of agri-food and food products. In 2015, the total retail value of the processed food and drink market in Japan was huge, valued at around US$200 billion.

Japan is the 4th ranked retail bakery products market worldwide and the second in the Asia Pacific region with US$23.6 billion in terms of retail sales in 2015.

The baked goods subsector led the way in the bakery products category with 78.2% of overall value sales in 2015, making it the largest of the three subsectors within the bakery category (Euromonitor International, 2015).

Japan's imports of Canadian bakery products have been steady over the last five years. In 2015, Japan imported close to US$8.0 million worth of bakery products from Canada. (GTA, 2016 Japan import data).

Canadian manufacturers could look to take advantage of the Canada Organic Equivalency Arrangement (JCOEA), which came into effect on January 1, 2015, by increasing their exports of organic bakery products or related ingredients into Japan. The Trans-Pacific Partnership agreement, once ratified may also present Canada with some exciting opportunities down the road.

Japanese consumers are more health conscious and are interested in organic products, naturally prepared, and functional foods. Japan's food market for high-value foods and beverages continues to evolve, with a continuing thrust toward functional, healthy and nutritious foods

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POSITIONING THE JAPANESE BAKERY MARKET IN THE WORLD

The global trend toward healthier food choices remains a key driver in the bakery products sector. This is manifesting itself via more nutritionally beneficial offerings, whether through increased fibre content, reduced fat or sugar, or addressing particular dietary requirements, such as gluten intolerance or diabetes. The diversity of bakery products is increasing and still represents a clear added-value to satisfy global consumers.

Top 10 Bakery Products Markets Worldwide in 2015, US$

Country	Retail Sales in US$ million
USA	89,169.8
China	36,950.7
Brazil	28,543.9
Japan	23,659.3
Mexico	19,635.0
France	19,344.0
Germany	19,182.9
Italy	19,172.1
United Kingdom	17,060.2
Turkey	15,183.2
Canada	8,992.0

Source: *Euromonitor International, 2016*

POSITIONING THE JAPANESE BAKERY MARKET IN THE ASIA-PACIFIC REGION

The Japanese are affluent consumers who set trends in Asia. The attitudes and consumption behaviours of the Japanese people make this mature market significantly different from those of other Asian countries. Consumers are increasingly interested in a diverse variety of foods that have superior taste, are safe and nutritious. Japanese consumers demand and will pay a premium for high-quality bakery products, provided they exceed expectations. They also value world-class recognition, such as Canadian salmon and maple syrup.

Top Bakery Products Markets in Asia Pacific in 2015, US$

Country	Retail Sales in US$ million
Asia Pacific	86,836.7
China	36,950.7
Japan	23,659.3
Indonesia	3,451.4
South Korea	2,879.5
Philippines	1,756.2
Taiwan	1,288.6
Vietnam	1,254.3
Thailand	1,201.1
Malaysia	828.4
Singapore	511.7

Source: *Euromonitor International, 2016*

Top 10 Importers of Bakery Products Worldwide 2015, US$

Country	Imports US$ Billions	Top Suppliers & Market Share			Canada's Share
		1	2	3	
United States	4,1	Canada 49.0%	Mexico 19.3%	Germany 3.5%	49.0%
United Kingdom	2,8	Germany 21.0%	France 18.2%	Belgium 11.5%	1.1%
France	2,6	Germany 25.7%	Belgium 19.6%	Italy 14.9%	0.04%
Germany	2,5	France 14.8%	Netherlands 14.5%	Poland 12.6%	0.01%
Canada	2,0	United States 80.8%	Mexico 2.7%	United Kingdom 2.4%	-
Belgium	1,3	France 33.8%	Netherlands 24.8%	Germany 14.8%	0.15%
Italy	1,1	Germany 29.2%	France 19.6%	Austria 11.3%	0.00%
Netherlands	1,1	Belgium 34.8%	Germany 29.8%	France 9.3%	0.03%
Spain	0.9	Germany 25.5%	France 23.0%	Italy 12.5%	0.00%
Austria	0.8	Germany 62.1%	Italy 7.8%	France 5.0%	0.00%

Source: *Global Trade Atlas, 2016*
Note: *For the purposes of this report, "bakery products" was defined using the following HS codes: 1904, 1905*

Although Canada exported almost US$2.2 billion worth of bakery products to the world in 2015, the majority went to the United States. However, Canada did export a small portion (0.3%) of bakery products to Japan in 2015. In addition, Japan's imports of Canadian bakery products have continued to steadily increase since 2010 and posted a compound annual growth rate (CAGR) of 7.4% from 2010 to 2015, while Japan's overall bakery imports is registering a decrease during the same period.

Bakery Products* Export Gap, 2015 (US$ Millions)

	2010	2011	2012	2013	2014	2015	2010-15 CAGR %
Japan's Imports of Bakery Products* from the World	364.6	438.5	485.4	444.9	424.6	351.1	-0.3
Japan's Imports of Bakery Products* from Canada	5.6	7.4	10.7	9.8	9.5	7.5	7.4
Gross Export Gap	359.0	431.1	474.7	435.0	415.0	351.2	-0.4

Source: *Global Trade Atlas, 2016* ***CAGR:*** *Compound Annual Growth Rate.*
Note: *For the purposes of this report, "bakery products" was defined using the following HS codes: 1904, 1905*

RETAIL ENVIRONMENT

In 2015, the Japanese packaged food industry was the third largest in the world, with US$158.0 billion in value sales, after the United States and China. Bakery products is the third-largest subcategory within the Japanese packaged food sector with US$23.6 billion or 14.9% of the total packaged food sales (Euromonitor International, 2015). For more information on the packaged food sector in Japan, please see the Global Analysis report: *Packaged Food Sales in Japan (February 2015).*

Overall, Japan's bakery industry saw slight value and volume sales growth from 2011 through 2015, rising to US$23.6 billion and 2.6 million tonnes. As seen in the charts below, for the forecasted period of 2016-2020, bakery value and volume sales are both expected to increase.

Historic Retail Value Sales of Bakery Products in Japan, in US$ Millions and Period Growth (%), Current Prices – Fixed 2015 Exchange Rates

Categories	2011	2012	2013	2014	2015	2011-15 CAGR* %
Bakery	23,366.0	23,283.9	22,982.5	23,316.8	23,659.3	0.3
Baked goods	18,905.8	18,859.1	18,527.9	18,467.7	18,512.9	-0.01
Biscuits and snack bars	4,123.7	4,052.1	4,041.1	4,340.9	4,526.4	0.02
Breakfast cereals	336.5	372.7	413.5	508.2	620.0	16.5

**CAGR: Compound Annual Growth Rate.*

Forecast Retail Value Sales of Bakery Products in Japan, in US$ Millions and Period Growth (%), Current Prices – Fixed 2015 Exchange Rates

Categories	2016	2017	2018	2019	2020	2015-20 CAGR* %
Bakery	24,183.7	24,823.9	25,379.7	25,926.6	26,462.4	2.3
Baked goods	18,771.0	19,113.5	19,431.3	19,747.9	20,058.9	1.7
Biscuits and snack bars	4,712.9	4,945.3	5,138.7	5,327.8	5,513.1	4.0
Breakfast cereals	699.8	765.1	809.7	850.9	890.4	6.2

**CAGR: Compound Annual Growth Rate.*

Historic Retail Volume in Tonnes ('000) of Bakery Products in Japan

Categories	2011	2012	2013	2014	2015	2011-15 CAGR* %
Bakery	2,600.3	2,602.4	2,605.7	2,638.9	2,674.5	0.7
Baked goods	2,304.0	2,305.0	2,303.8	2,315.0	2,332.4	0.3
Biscuits and snack bars	264.8	261.8	261.2	272.0	277.8	1.2
Breakfast cereals	31.5	35.6	40.7	51.9	64.3	19.5

**CAGR: Compound Annual Growth Rate.*

Forecast Retail Volume in Tonnes ('000) of Bakery Products in Japan

Categories	2016	2017	2018	2019	2020	2015-20 CAGR* %
Bakery	2,696.2	2,702.8	2,709.3	2,716.0	2,720.8	0.2
Baked goods	2,342.6	2,341.4	2,342.1	2,343.5	2,343.2	0.0
Biscuits and snack bars	281.9	285.2	288.2	291.0	293.8	1.0
Breakfast cereals	71.7	76.2	79.0	81.5	83.8	4.0

**CAGR: Compound Annual Growth Rate.*

Top Five Bakery Products Company Shares in Japan - Retail Value Sales % Breakdown

Companies	2011	2012	2013	2014	2015
Yamazaki Baking Co Ltd	16.1	16.3	16.5	16.8	16.7
Shikishima Baking Co Ltd	6.0	6.2	6.4	6.5	6.6
Fuji Baking Co Ltd	5.4	5.4	5.5	5.5	5.6
Bourbon Corp	3.2	3.1	3.0	3.1	3.0
Ezaki Glico Co Ltd	2.3	2.4	2.4	2.6	2.7
Artisanal	25.71	25.66	25.72	25.83	25.83
Others	29.57	29.06	28.04	26.62	25.41

***Source for all:** Euromonitor International, 2016*

The Japanese bakery industry is led by domestic players: Yamazaki Baking. Co. Ltd, Shikishima Baking. Co. Ltd, Fuji Baking. Co. Ltd, Kobeya Baking. Co. Ltd, and First Baking. Co. Ltd. Together, these top five suppliers hold 34.6% of the available market share. The artisanal bakeries and others, hold little more than half of market share, making the Japanese bakery sector somewhat fragmented, and would allow possible opportunities for Canadian companies (Euromonitor International, 2016).

SUBSECTOR ANALYSIS

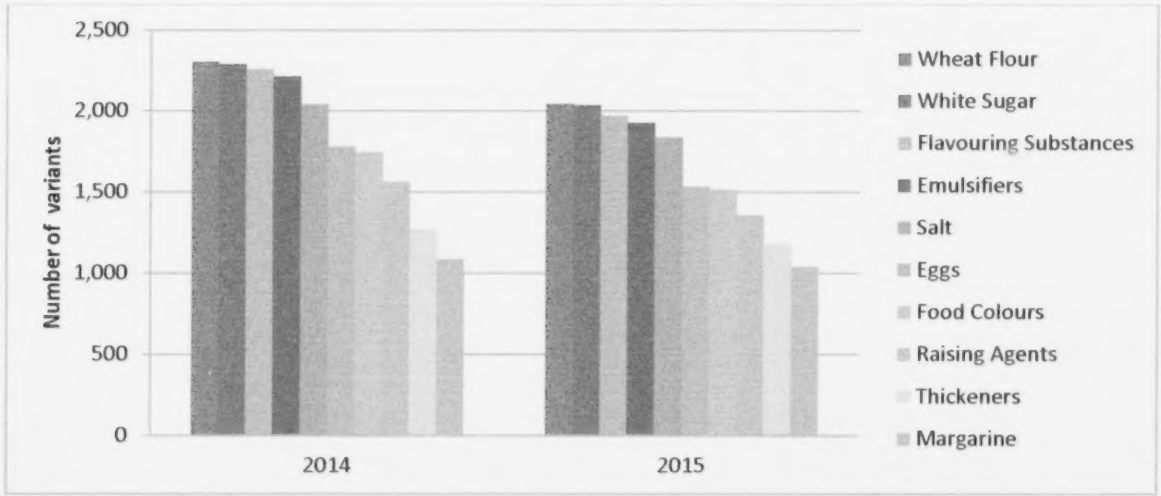
Mintel reported that Japan had 2,176 new baked goods product launches in 2015 and 8,058 products from January 2011 to December 2015. The top five ingredients over this period were wheat flour (#1), sugar (#2), flavouring substances (#3), emulsifiers (#4) and salt (#5). The most popular type of single flavouring among 758 new launches was identified by a single flavour such as chocolate (#1), unflavoured/plain (#2) and strawberry (#3). However, blended flavouring, which means two or more flavours, such as custard and maple, were used in the same product are preferred above all single flavours. The top three claims were no preservatives, high in vitamins, and microwaveable.

New Bakery products product Introductions 2011-2015

Sub-Category	2011	2012	2013	2014	2015	Total Sample
Cakes, pastries and sweet goods	170	221	1,196	1,572	1,351	4,650
Sweet biscuits/cookies	312	375	405	578	503	2,228
Bread and bread products	13	5	250	171	203	668
Baking ingredients and mixes	42	38	36	26	43	188
Savoury biscuits/crackers	48	28	26	42	33	181
Cold cereals	12	16	16	53	42	140
Hot cereals	1	0	0	1	1	3
Total Sample	598	683	1,929	2,443	2,176	8,058

Source: *Mintel GNPD 2016*

Top 10 Bakery Products Ingredients 2014-2015



Baked Goods

Baked goods is the largest of the three subsectors within the bakery category and has experienced variable growth over the last five years. By the end of 2015, the baked goods subsector settled with sales of US$18.5 billion, which was the same level of sales as 2010. Euromonitor International is forecasting a steady increase in sales from 2016 to 2020, where value sales are estimated to reach US$20.1 billion.

When it comes to retail volume percentage, there is no one dominating segment within the baked goods subsector. While bread leads the way with 39.0% of total retail volume sales, it is followed closely by pastries with 36.7% and then cakes with 23.6%. On the other hand, when talking about value, cakes are the dominant segment and make up 50.4% of total baked goods sales because of their relatively high price point, followed by pastries (31.6%) and then bread (17.9%) (Euromonitor International, 2016).

Historic Retail Volume in Tonnes ('000) of Baked Goods Categories in Japan

'000 tonnes	2011	2012	2013	2014	2015	CAGR % 2011-15
Bread	869.7	870.9	893.7	903.7	910.7	1.2
- Bread Substitutes	3.9	3.9	3.5	3.5	3.5	-3.1
- Packaged Bread	615.5	618.0	637.2	648.2	656.0	1.6
- Unpackaged Bread	250.3	249.0	253.0	252.0	251.2	0.1
Cakes	569.0	568.9	556.4	552.9	550.5	-0.8
- Packaged Cakes	424.6	425.1	414.9	412.8	411.5	-0.8
- Unpackaged Cakes	144.4	143.8	141.5	140.1	139.0	-1.0
Pastries	850.7	850.9	839.8	844.0	856.6	0.2
- Packaged Pastries	709.8	710.5	699.9	705.1	718.5	0.3
- Unpackaged Pastries	140.9	140.3	139.9	138.9	138.1	-0.5
Dessert Mixes	11.9	11.7	11.5	11.6	11.7	-0.5
Frozen Baked Goods	2.7	2.7	2.5	2.7	2.9	1.6
Total Baked Goods	2304.0	2305.0	2303.8	2315.0	2332.4	0.3

Forecast Retail Volume in Tonnes ('000) of Baked Goods Categories in Japan

'000 tonnes	2016	2017	2018	2019	2020	CAGR % 2016-20
Bread	915.2	917.8	919.3	920.1	920.3	0.1
- Bread Substitutes	3.5	3.4	3.4	3.4	3.4	-0.4
- Packaged Bread	661.3	664.6	666.6	667.9	668.6	0.3
- Unpackaged Bread	250.5	249.8	249.3	248.8	248.3	-0.2
Cakes	548.9	541.6	538.1	536.6	535.8	-0.6
- Packaged Cakes	410.7	405.8	403.0	402.1	401.7	-0.6
- Unpackaged Cakes	138.1	135.8	135.1	134.5	134.1	-0.7
Pastries	863.8	867.0	869.7	871.7	871.8	0.2
- Packaged Pastries	726.4	730.1	733.0	735.2	735.5	0.3
- Unpackaged Pastries	137.4	137.0	136.7	136.5	136.3	-0.2
Dessert Mixes	11.8	11.9	11.9	11.9	11.9	0.4
Frozen Baked Goods	3.0	3.1	3.2	3.2	3.3	2.3
Total Baked Goods	2342.6	2341.4	2342.1	2343.5	2343.2	0.0

Source for both: *Euromonitor International, 2016*
Note*: *Percentage calculation done by AAFC based on data from Euromonitor International*

Locally owned companies, who combined account for 41.6% of the overall market share, lead the Japanese baked goods sector. All of the top five companies in the chart below are locally owned and operated in Japan. The most dominant domestic player in the Japanese baked goods sector is Yamazaki Baking. Co. Ltd with their multiple brands of Yamazaki, Lunch Pack, Mini Pan, and Chou Houjun to name just a few, and holds the largest market share with 21.3%, or half the amount of the remaining top four companies (Euromonitor International, 2016).

Top Five Japanese Baked Goods Companies and Market Shares
Retail Value Sales % Breakdown

Companies	2011	2012	2013	2014	2015
Yamazaki Baking Co Ltd	19.3	19.5	20.0	20.6	21.3
Shikishima Baking Co Ltd	7.6	7.9	8.1	8.2	8.2
Fuji Baking Co Ltd	6.5	6.5	6.7	7.0	7.2
Kobeya Baking Co Ltd	2.8	2.8	2.7	2.8	2.9
First Baking Co Ltd	2.1	2.0	2.0	2.1	2.1

Source: *Euromonitor International, 2016*

Biscuits and Snack Bars

Of the three subsectors within bakery products, biscuits and snack bars is the second-largest with retail sales of $4.5 billion in 2015. The category saw a 2.1% increase in value in 2015 over 2014. This performance was attributed to the increasing health awareness of aging Japanese consumers who favour wholesome and high quality bakery products.

The biscuit subsector is comprised of savoury biscuits and crackers, and sweet biscuits. Over the last five years, sweet biscuits made up around 90% of the total retail volume, while savoury biscuits and crackers hovered around 9.5%. Euromonitor International forecasts that this percentage split will hold through 2020.

Historic Retail Volume in Percentage* (%) of Biscuits and Snack Bars Categories in Japan

'000 tonnes	2011	2012	2013	2014	2015	CAGR % 2011-15
Biscuits	242.8	239.7	239.0	248.7	254.0	1.1
- Savoury Biscuits	21.6	21.0	22.0	23.0	24.2	2.8
- Sweet Biscuits	221.1	218.8	217.0	225.6	229.8	1.0
-- Chocolate Coated Biscuits	65.1	64.1	66.3	70.4	71.9	2.5
-- Cookies	39.6	39.8	40.0	39.3	39.1	-0.3
-- Filled Biscuits	34.9	34.8	35.2	36.6	37.2	1.7
-- Plain Biscuits	45.2	44.2	40.0	42.5	44.2	-0.5
-- Sandwich Biscuits	36.4	35.9	35.5	36.8	37.4	0.7
Snack Bars	22.0	22.1	22.3	23.3	23.8	2.0
- Breakfast Bars	4.6	4.8	4.9	5.2	5.3	3.5
- Energy and Nutrition Bars	17.3	17.3	17.3	18.1	18.5	1.6
- Granola Bars	0.1	0.1	0.1	0.1	0.1	0.0
Biscuits and Snack Bars	264.8	261.8	261.3	272.0	277.8	1.2

Source: *Euromonitor International, 2016*
Note: *Percentage calculation done by AAFC based on data from Euromonitor International*

Forecast Retail Volume in Percentage (%) of Biscuits and Snack Bars Categories in Japan

'000 tonnes	2016	2017	2018	2019	2020	CAGR % 2016-20
Biscuits	257.8	261.1	263.9	266.7	269.4	1.1
- Savoury Biscuits	25.4	26.7	28.0	29.5	31.0	5.2
- Sweet Biscuits	232.4	234.4	235.9	237.2	238.4	0.6
-- Chocolate Coated Biscuits	73.2	74.3	75.4	76.5	77.6	1.5
-- Cookies	38.9	38.8	38.7	38.5	38.5	-0.3
-- Filled Biscuits	37.6	37.8	37.9	38.0	38.0	0.3
-- Plain Biscuits	45.1	45.5	45.7	45.8	45.8	0.4
-- Sandwich Biscuits	37.8	38.0	38.2	38.4	38.5	0.5
Snack Bars	24.1	24.2	24.3	24.4	24.4	0.3
- Breakfast Bars	5.3	5.3	5.3	5.4	5.4	0.3
- Energy and Nutrition Bars	18.8	18.8	18.9	19.0	19.0	0.3
- Granola Bars	0.1	0.1	0.1	0.1	0.1	0.0
Biscuits and Snack Bars	281.9	285.2	288.2	291.0	293.8	1.0

Source: *Euromonitor International, 2016*
Note: *Percentage calculation done by AAFC based on data from Euromonitor International*

Four of the top five Japanese biscuit companies are domestic and combined, account for 57% of the total market share. These companies are Ezaki Glico Co Ltd with their leading brand of Pocky, followed by Bourbon Corp and their brand of Alfort, Meiji Holdings. Co. Ltd and their brand Takenoko, Lotte Group with their leading brand of Toppo, and finally Yamazaki Nabisco (Euromonitor International, 2016).

Top Five Japanese Biscuit Companies and Market Shares – Retail Value Sales % Breakdown

Companies	2011	2012	2013	2014	2015
Ezaki Glico Co Ltd	15.3	15.2	16.5	17.0	16.8
Bourbon Corp	13.9	13.9	13.9	13.0	12.7
Meiji Co Ltd	10.6	11.4	11.3	11.4	11.8
Lotte Co Ltd	8.7	8.8	9.0	8.8	8.6
Yamazaki Nabisco Co Ltd	7.6	7.8	7.8	7.5	7.2

Source: *Euromonitor International, 2016*

Breakfast Cereals

The breakfast cereals sector is the smallest subsector within the bakery category in Japan, but was the best preforming with a CAGR of 19.5% from 2011 to 2015, reaching value sales of US$620.0 million. This subsector looks to continue its upward motion through 2020, where value sales are estimated to rise to US$890.4 million a CAGR of 6.2%. This increase will be further perpetuated by the fact that Japanese consumers are adopting breakfast cereals, especially types which contain fruit, as being visually appealing and delicious with large pieces of dried fruit. Major manufacturers have launched semi-premium granola with larger pieces of dried fruit that satisfies in terms of visual appeal and taste as well as in terms of the health benefits and convenience.

The breakfast cereals subcategory is broken down into three main segments: children breakfast cereals, family breakfast cereals, and hot cereals. Family breakfast cereals hold around 86% of the total retail volume within this category, followed by children's breakfast cereals at almost 13%, and hot cereals hovering under 1% (Euromonitor International, 2016).

Historic Retail Volume in Percentage (%) of Breakfast Cereals Categories in Japan

'000 tonnes	2011	2012	2013	2014	2015	CAGR % 2011-15
Hot Cereals	0.4	0.3	0.3	0.3	0.3	-1.5
RTE Cereals	31.2	35.2	40.4	51.6	63.9	19.7
- Children's Breakfast Cereals	10.7	10.7	9.8	9.2	8.8	-4.8
- Family Breakfast Cereals	20.5	24.5	30.6	42.4	55.2	28.1
-- Flakes	9.1	9.3	9.1	8.9	8.8	-0.8
-- Muesli	8.5	12.4	18.6	30.8	43.7	50.7
-- Other RTE Cereals	2.9	2.9	2.8	2.7	2.7	-2.0
Breakfast Cereals	31.5	35.6	40.7	51.9	64.3	19.5

Forecast Retail Volume in Percentage (%) of Breakfast Cereals Categories in Japan

'000 tonnes	2016	2017	2018	2019	2020	CAGR % 2016-20
Hot Cereals	0.3	0.3	0.3	0.3	0.3	-0.8
RTE Cereals	71.4	75.9	78.7	81.2	83.5	4.0
- Children's Breakfast Cereals	8.5	8.3	8.2	8.2	8.2	-1.0
- Family Breakfast Cereals	62.9	67.6	70.5	73.0	75.3	4.6
-- Flakes	8.7	8.7	8.7	8.7	8.7	-0.1
-- Muesli	51.5	56.3	59.1	61.7	64.0	5.6
-- Other RTE Cereals	2.7	2.7	2.6	2.6	2.6	-0.5
Breakfast Cereals	71.7	76.2	79.0	81.5	83.8	4.0

Source for both: *Euromonitor International, 2014*
Note: *Percentage calculation done by AAFC based on data from Euromonitor International*

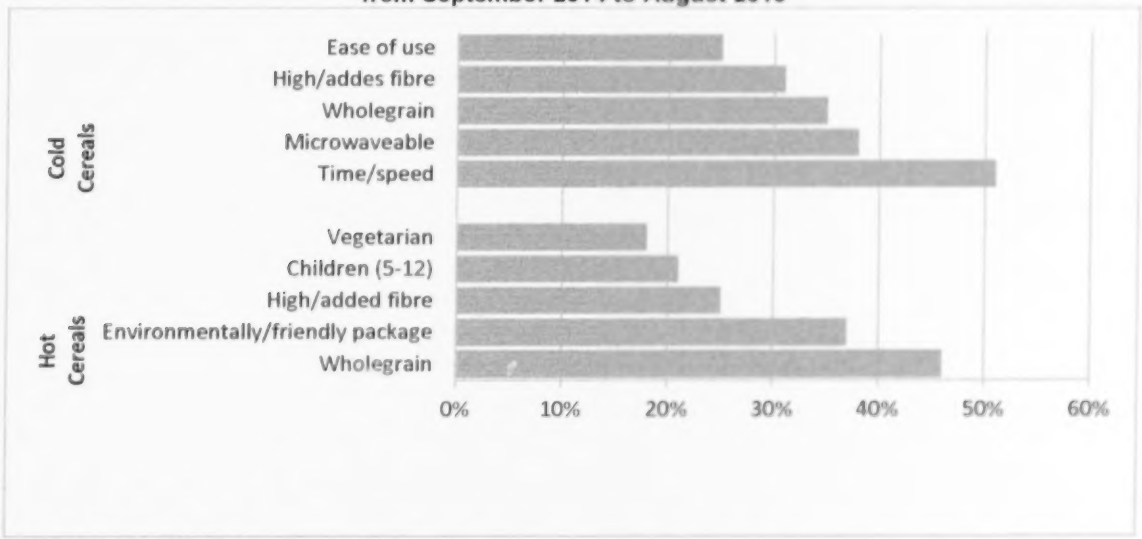
Three of the top five companies (Calbee Foods.Co. Ltd, Nissin Foods Holdings. Co. Ltd, and Nihonshokuhin Ltd.) are domestically owned and operated and combined, account for 48.1% of the total breakfast cereals market share. However, important to note is that up until 2014, Kellogg Co, an international company, held over 30% of the market and was the leading company within the breakfast cereal subcategory. Kellogg Co.'s 2015 decline in market share was partly attributed to the continuing good performance of Calbee Foods' Fruit Granola product and brand (Euromonitor International, 2016).

Top Five Japanese Breakfast Cereals Companies and Market Shares, Retail Value Sales % Breakdown

Companies	2011	2012	2013	2014	2015
Calbee Foods Co Ltd	14.7	19.6	25.3	28.5	31.2
Kellogg (Japan) KK	35.8	32.3	30.3	28.5	25.3
Nissin Cisco Co Ltd	12.8	13.6	15.9	17.3	18.0
Nihonshokuhin Ltd	0.4	0.4	0.3	0.3	0.3
AEON Co Ltd	0.3	0.3	0.2	0.2	0.1

Source: *Euromonitor International, 2014*

Top 5 Claims for Hot and Cold Cereals, % of New Products Launches in Japan from September 2014 to August 2015



Source: *Mintel GNPD, 2016*

Hot cereals focus on convenience

Due to the fact that they generally require more preparation than cold cereals, hot cereals focus more on convenience, with many tagged with the time and speed claims (51%), described as microwaveable (38%) or deemed easy to use (25%).

Cold cereals highlight wholegrain

Cold cereals on the other hand focus very much on the presence of wholegrain (45% vs 35% for hot cereals), eco-friendly packaging and are also more likely to highlight products for children (20% vs 2% for hot cereals).

FOR MORE INFORMATION

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

- **Overview of Trade Commissioner Services in Japan**
  http://www.tradecommissioner.gc.ca/eng/offices-japan.jsp
- **Find a Trade Commissioner**
  www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp

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- ats-sea.agr.gc.ca

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RESOURCES

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Bakery Products in Japan
Global Analysis Report

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